NEOGOV ON – TRAINING GUIDE	
Objective:	This Training Guide focuses on how to navigate within NEOGOV Onboard and perform the routine employee and manager tasks for new hires.

Pre-Requisite Requirements:

- New Hires have been authorized in NEOGOV Insight and the nightly feed has auto-created the pending hire in HRMN.
- New Hires have been loaded to Onboard and activated.

Helpful Tips:

- Clicking on the NEOGOV icon in the upper left hand corner always returns a user to their dashboard.
- A checklist is a collection of forms the new hire will be filling out and/or reviewing. Each new hire will be assigned a Standard Forms checklist. Each form has different due dates, based on the information being provided.
- Each new hire will have a Getting Started portal page (where the checklist displays), an Employment Information portal page (general information applicable to all State employees) and an agency portal page (displaying information specific to their agency).

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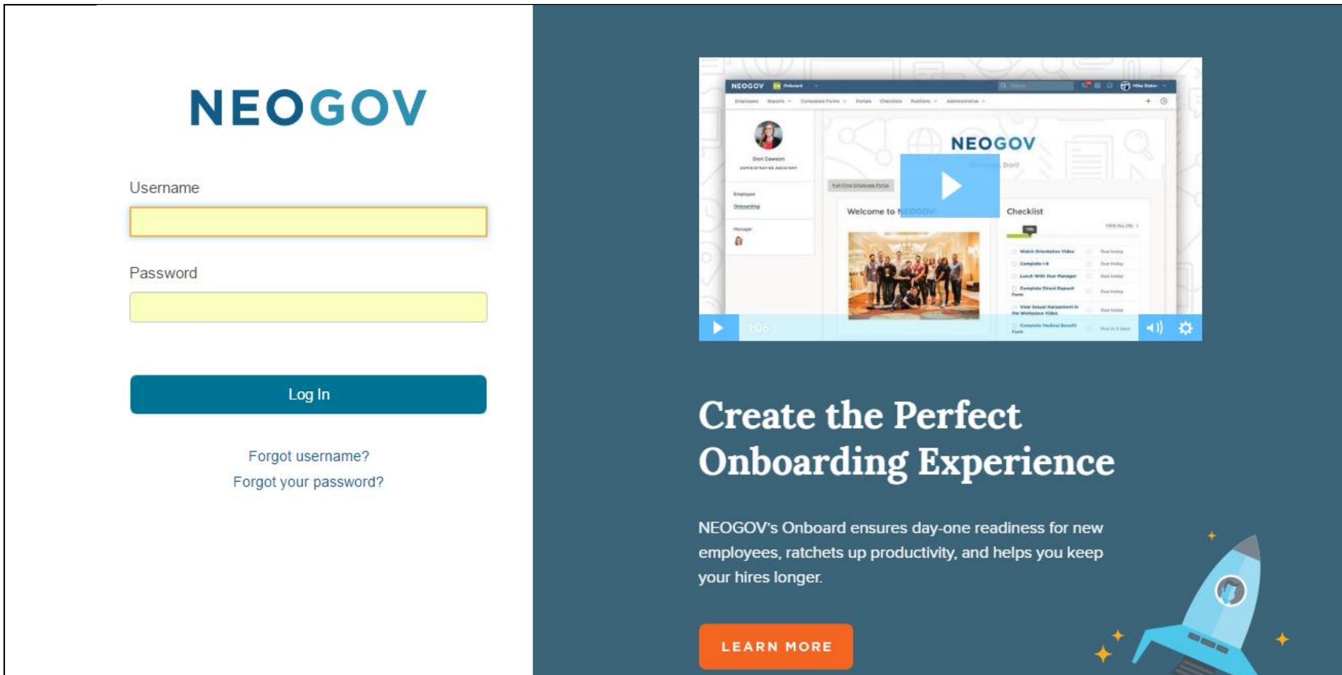
LOGIN

You can access NEOGOV Onboard using the following link: https://onboard.neogov.com/onboard/#/employee

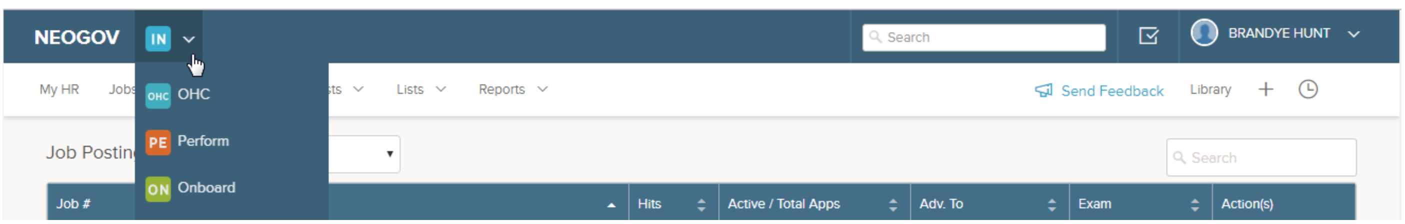
You should have received an **Activate Your NEOGOV Onboard User Account** email with a link to create your account **Password** using your email address as your **Username**. This activation is good for 24 hours and will expire. If you require a new activation, please contact your HR Office or the NEOGOV mailbox at MCSC-NEOGOV@michigan.gov.

NOTE: Current NEOGOV Insight and OHC users will use their current Insight and/or OHC username and password.

1. Log into the NEOGOV Onboard site using your **Username** and **Password.** Click on the **Sign In >>** button.



2. If you are already logged into NEOGOV performing other functions, you can simply toggle over to Onboard by clicking on the down-arrow next to the NEOGOV product and selecting Onboard.



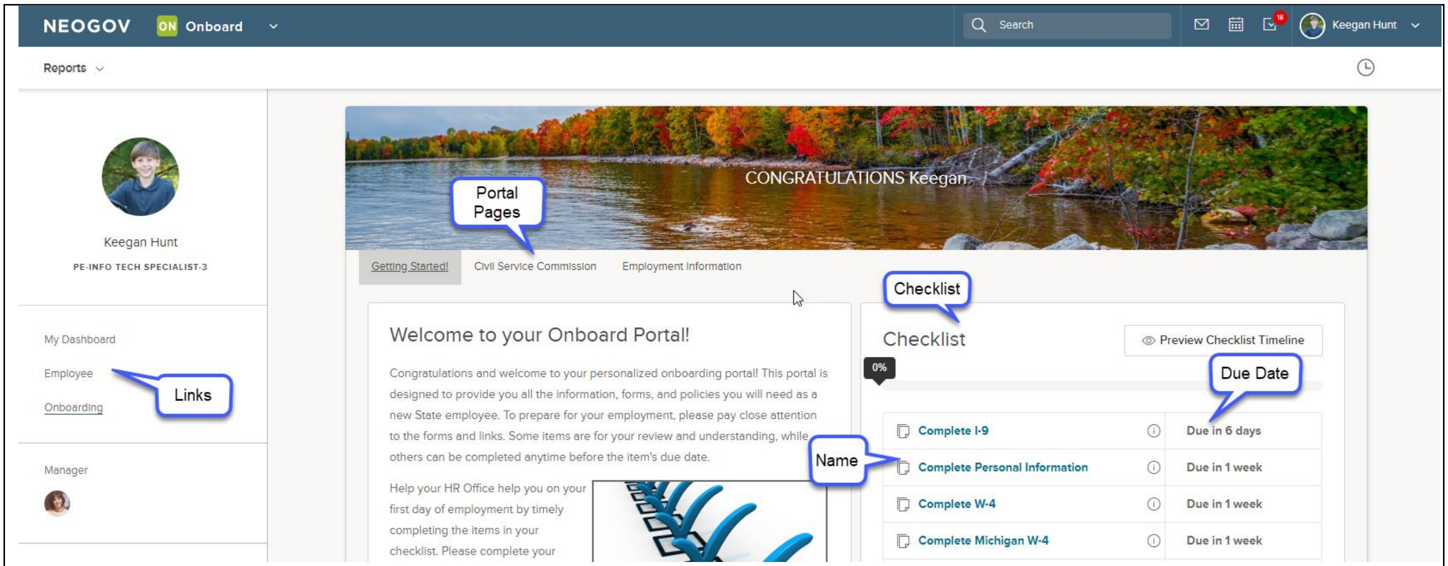
3. The system can also be accessed from the HR Gateway page.

Dashboard

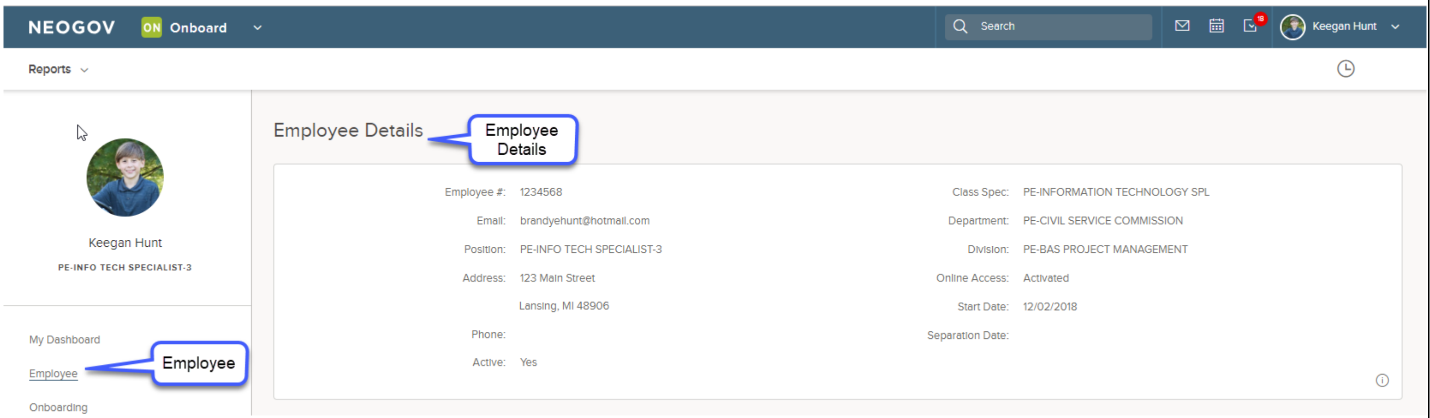
1. Upon login, you will see your **Onboarding** screen. Within the **Onboarding** screen you will see your **Portal** page(s), **Checklist** items, and important **Links**.

2. The **Getting Started** portal will always return you to your **Onboarding** screen. The **Employment Information** portal will provide general employment information. Your agency-specific portal page (i.e. Civil Service Commission, below) will provide you with links, information and forms specific to the agency in which you will be working. Please be sure to click on all and review thoroughly.

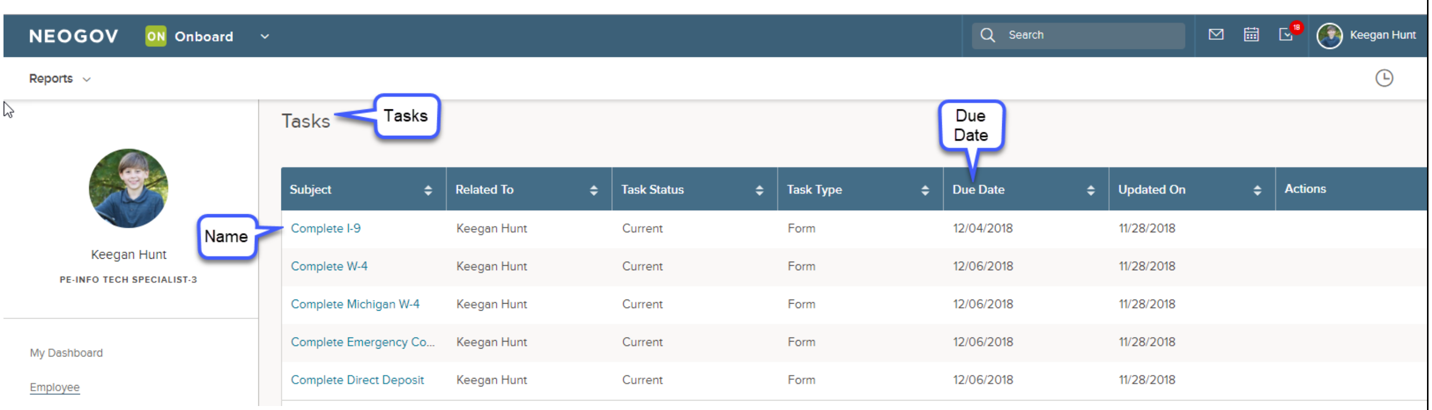
3. Items in the **Checklist** section are forms or information you should review and complete prior to their due date. To review each form, simply click on the name.



4. Click on the **Employee** link. Your **Employee Details** will display.

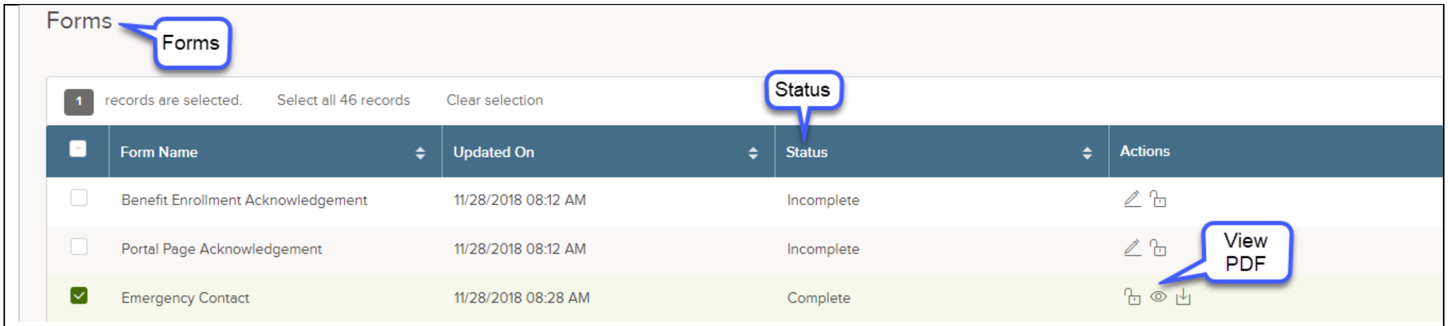


5. Scrolling down will display the **Tasks** section. The forms and information displayed on your **Checklist** are also displayed here. You can access and complete these in either location by simply clicking on the name.

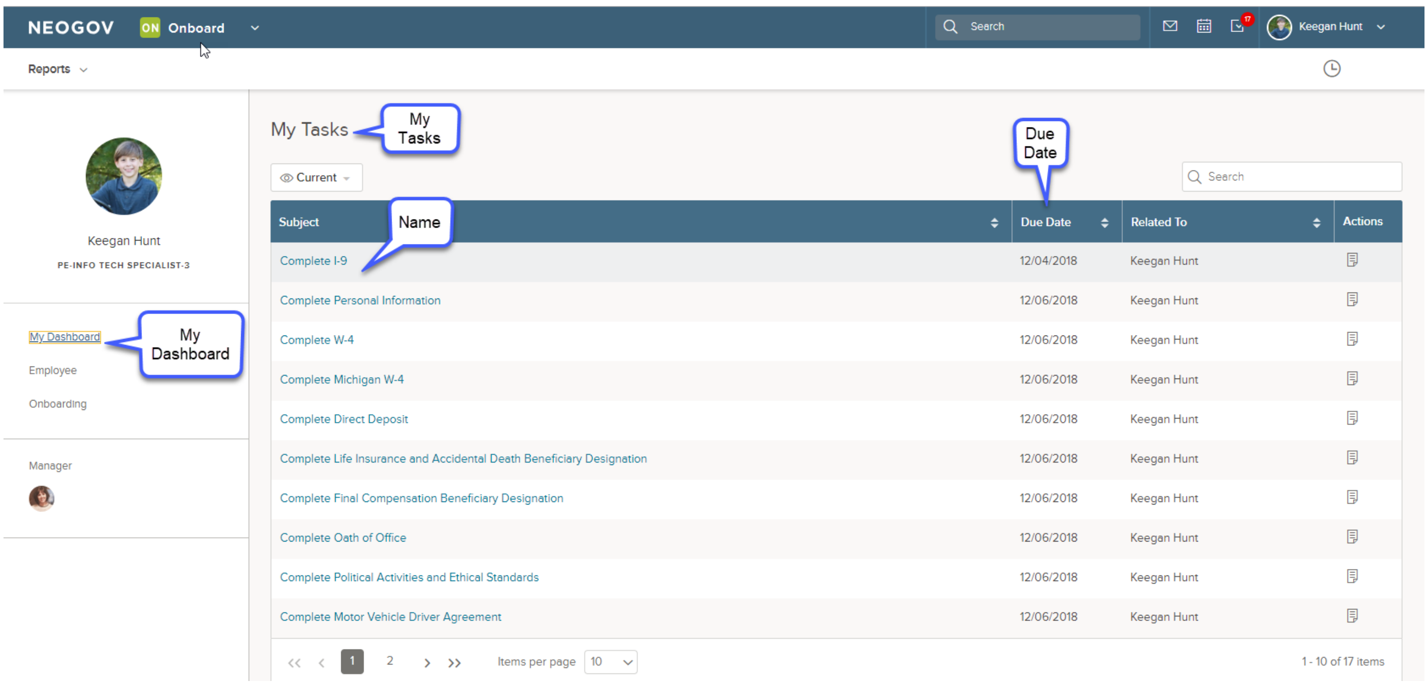


Subject	Related To	Task Status	Task Type	Due Date	Updated On	Actions
Complete I-9	Keegan Hunt	Current	Form	12/04/2018	11/28/2018	
Complete W-4	Keegan Hunt	Current	Form	12/06/2018	11/28/2018	
Complete Michigan W-4	Keegan Hunt	Current	Form	12/06/2018	11/28/2018	
Complete Emergency Co...	Keegan Hunt	Current	Form	12/06/2018	11/28/2018	
Complete Direct Deposit	Keegan Hunt	Current	Form	12/06/2018	11/28/2018	

6. Scrolling down again will display the **Forms** section. Any form with a status of **Complete** can be saved or printed as a PDF document for your records. Simply place a checkmark in front of the form name(s) and click **View PDF**. Your form(s) will display and can be downloaded.



7. Click on the **My Dashboard** link. **My Tasks** will display. Again, The forms and information displayed on your **Checklist** are also displayed here. Forms and information should be reviewed and completed prior to their due date. You can access and complete these in any of these locations.

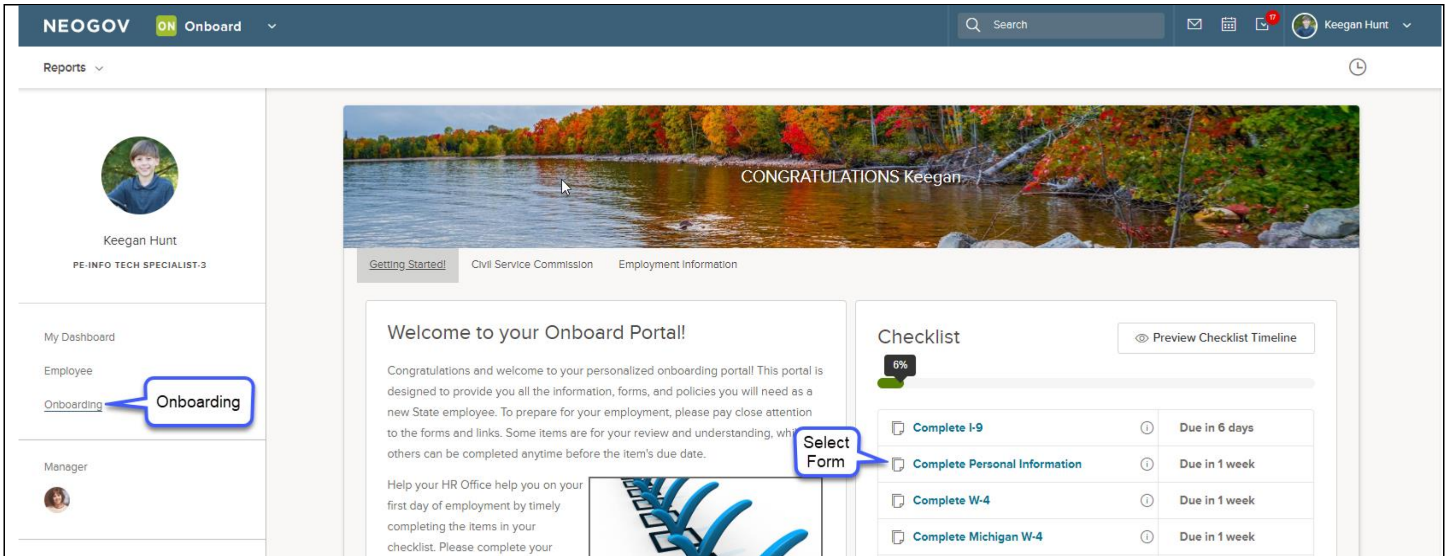


8. Clicking on the **NEOGOV** icon in the upper left hand corner always return you to your **Onboarding** screen.

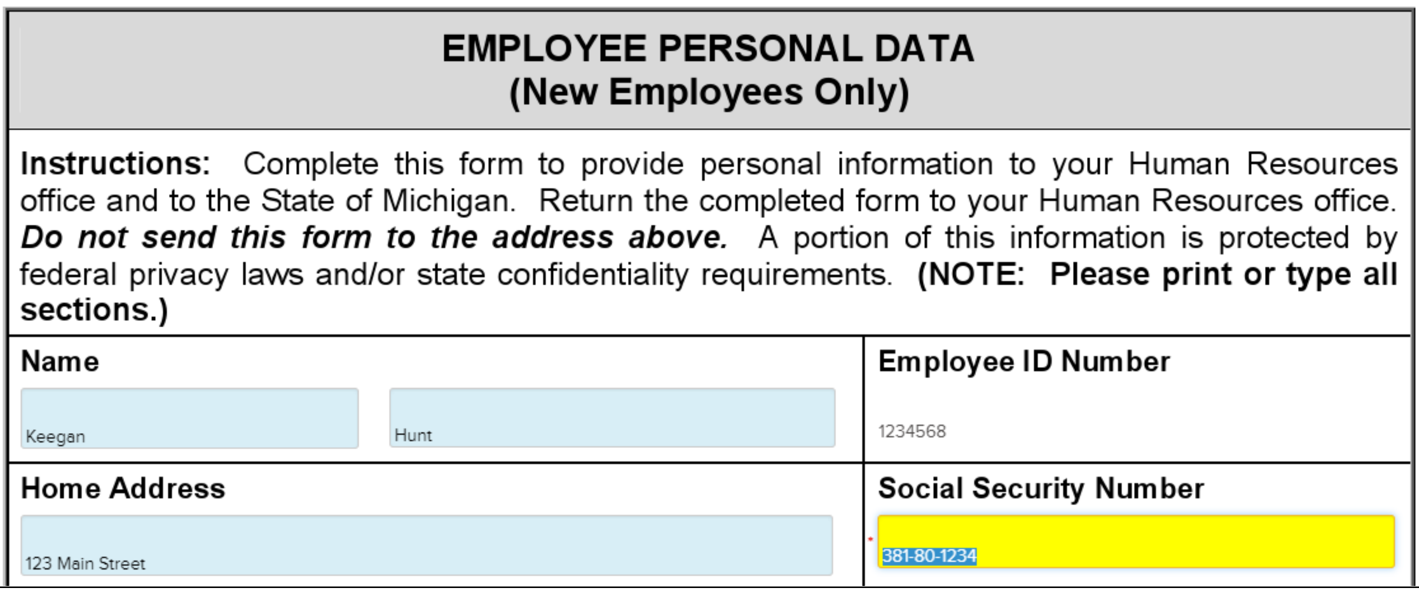
Completing Forms

1. Completing any form in Onboarding follows the same process. Select (click on) the form, review the information, fill in the necessary fields, and click Save at the bottom of the form.

2. Upon login, the **Onboarding** screen will display. Within the **Checklist** section, select the form name. For this example, we will use the **Personal Information** form.



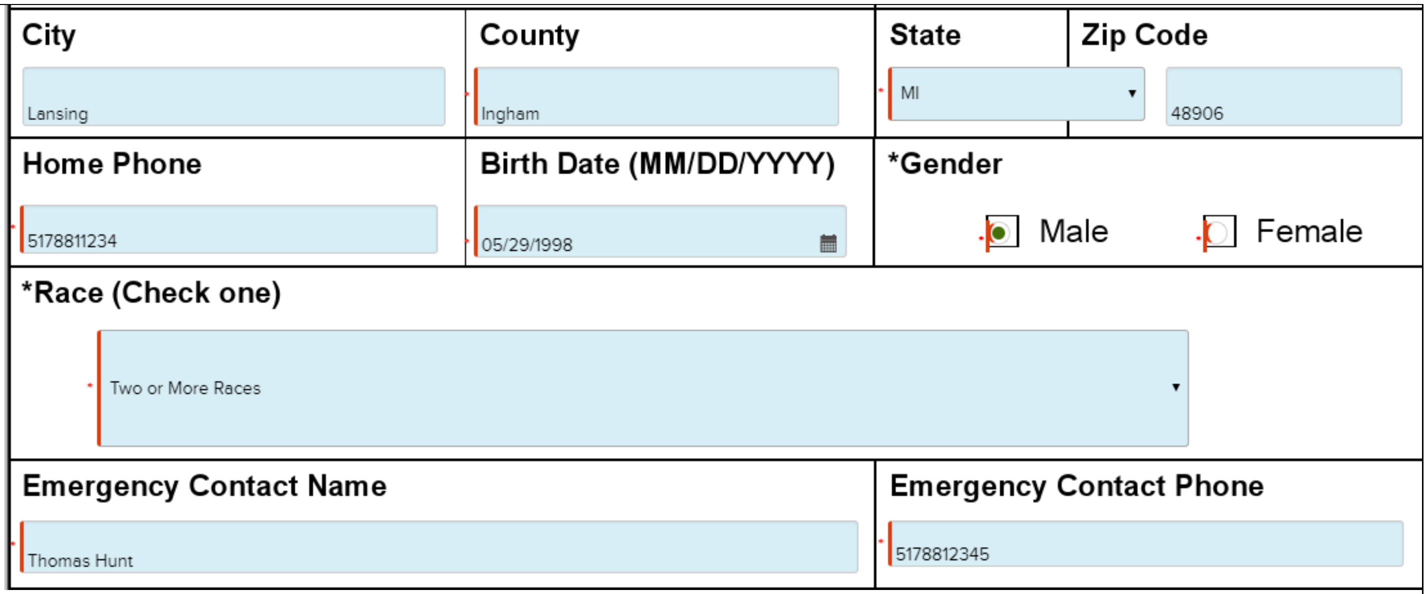
3. Review the information within the form and update/complete any necessary fields.



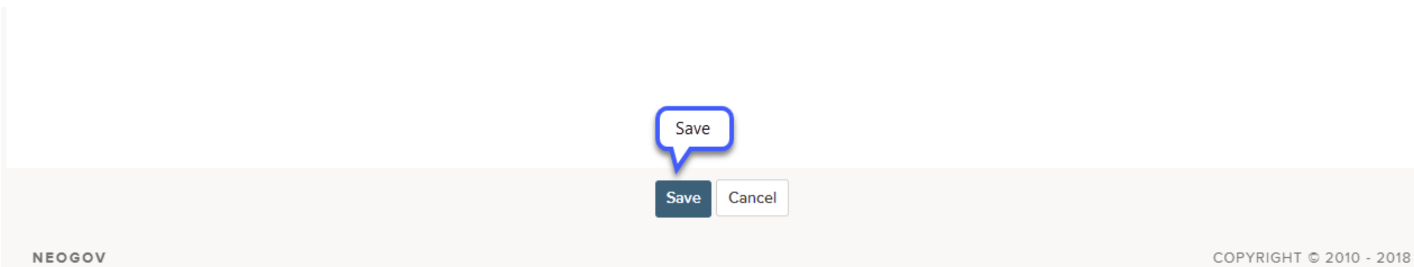
EMPLOYEE PERSONAL DATA
(New Employees Only)

Instructions: Complete this form to provide personal information to your Human Resources office and to the State of Michigan. Return the completed form to your Human Resources office. ***Do not send this form to the address above.*** A portion of this information is protected by federal privacy laws and/or state confidentiality requirements. **(NOTE: Please print or type all sections.)**

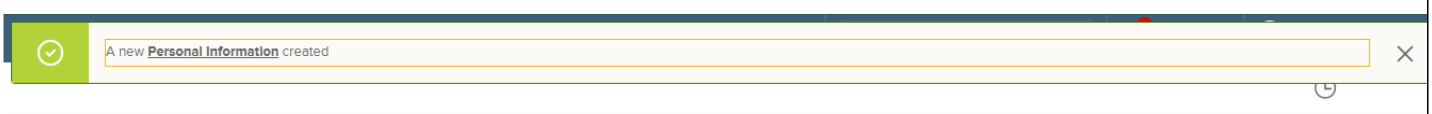
Name Keegan Hunt	**Employee ID Number** 1234568
Home Address 123 Main Street	**Social Security Number** 381-80-1234



4. When complete, select Save at the bottom of the form.

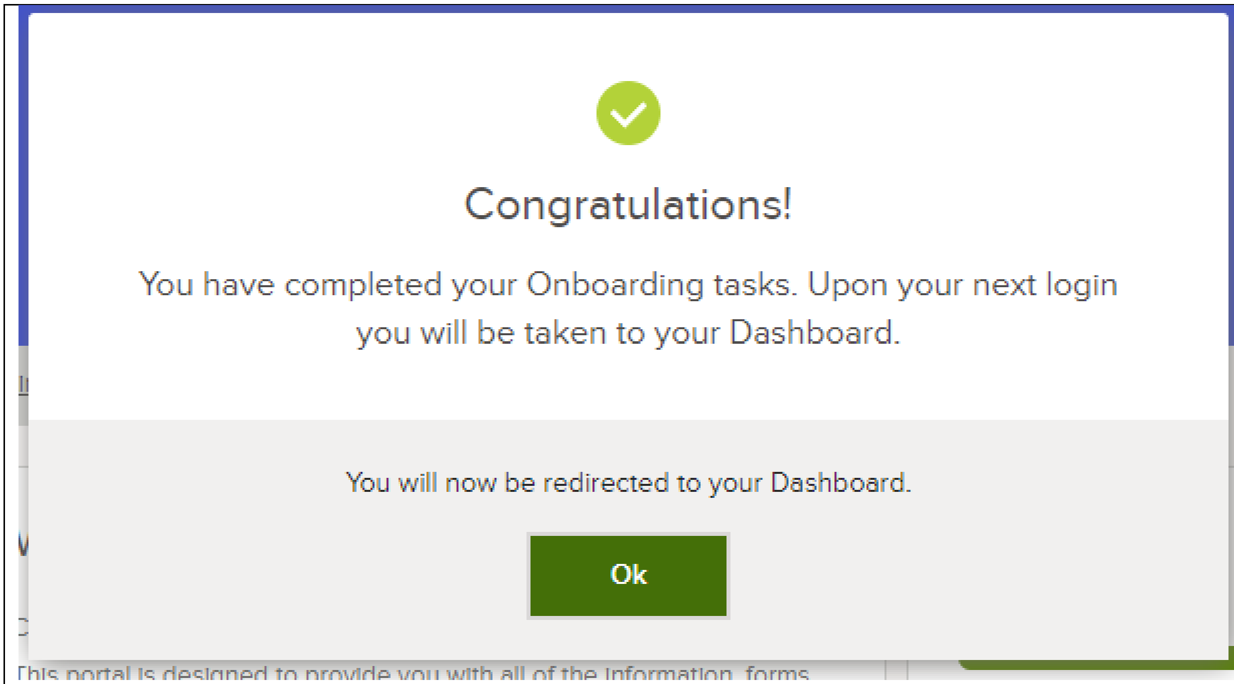


5. A banner will display at the top of your screen that the form was created. You may continue completing each form.



6. Some tips to keep in mind as you are completing forms:
   - Make sure your social security number is correct
   - Dates should be MM/DD/YYYY
   - States should be the two-character abbreviation (i.e. MI for Michigan)
   - For direct deposit information, make sure routing number(s) and account number(s) are correct with no spaces or non-numeric characters
   - Complete all required fields (noted with a red asterisk)
   - Clicking Save submits the form; if you have accidently submitted incorrect data please contact your HR Office representative

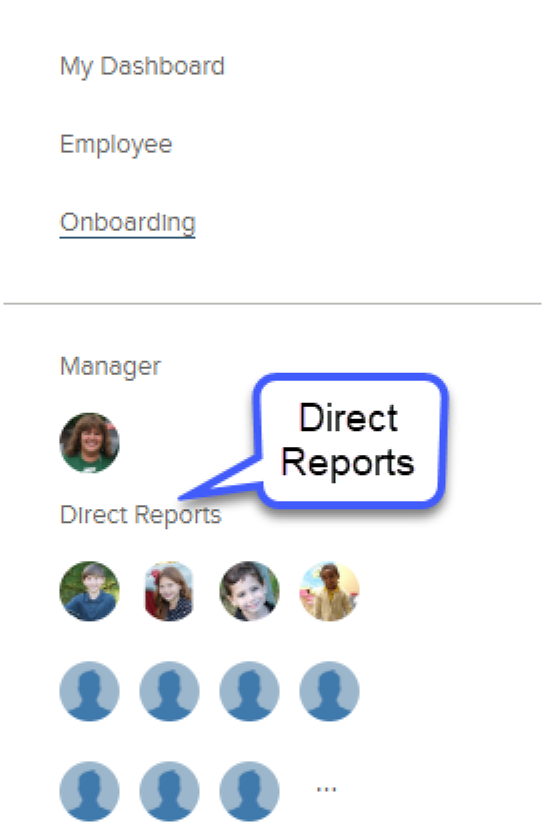
7. Once all forms are completed, you will receive the following message. Click **OK**. You have completed the process!



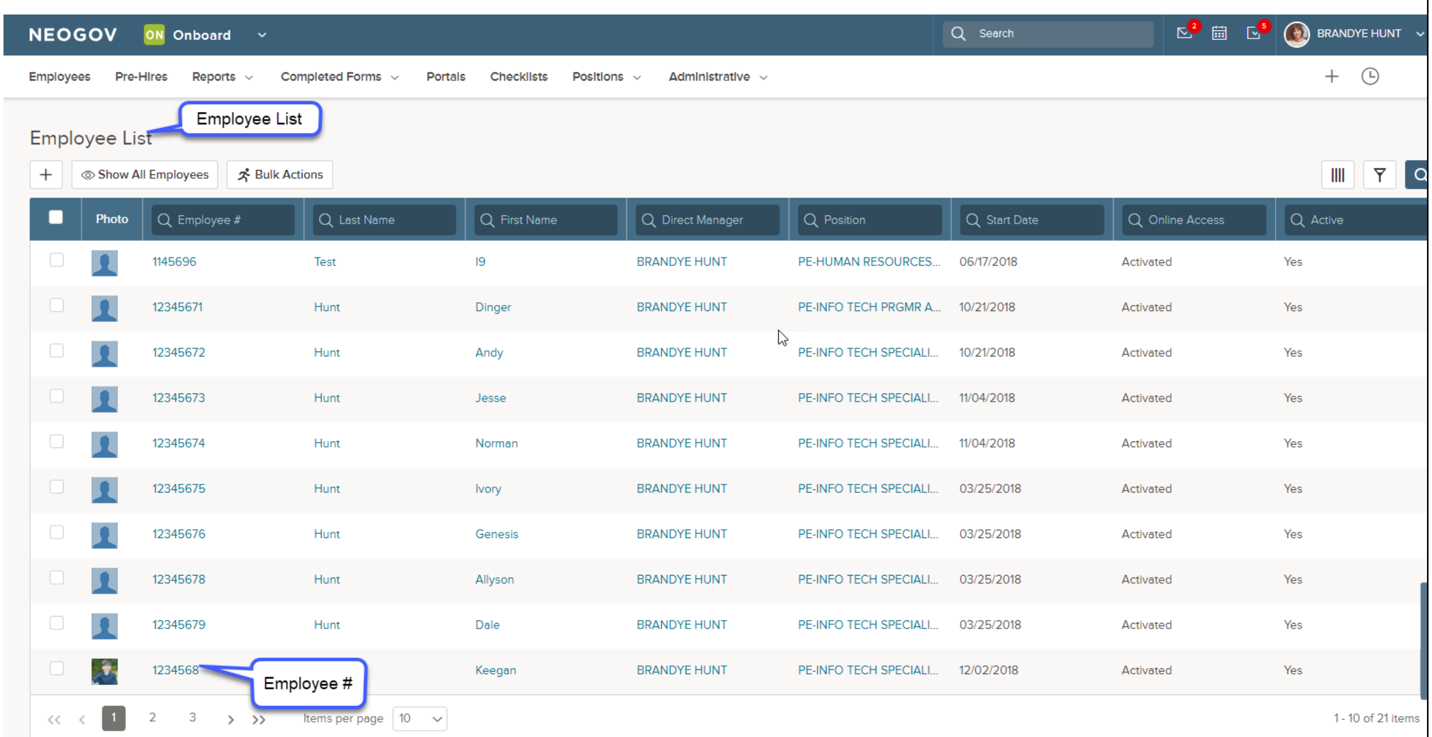
Dashboard - Managers

If you are a Manager, the dashboard will have a few additional items available:

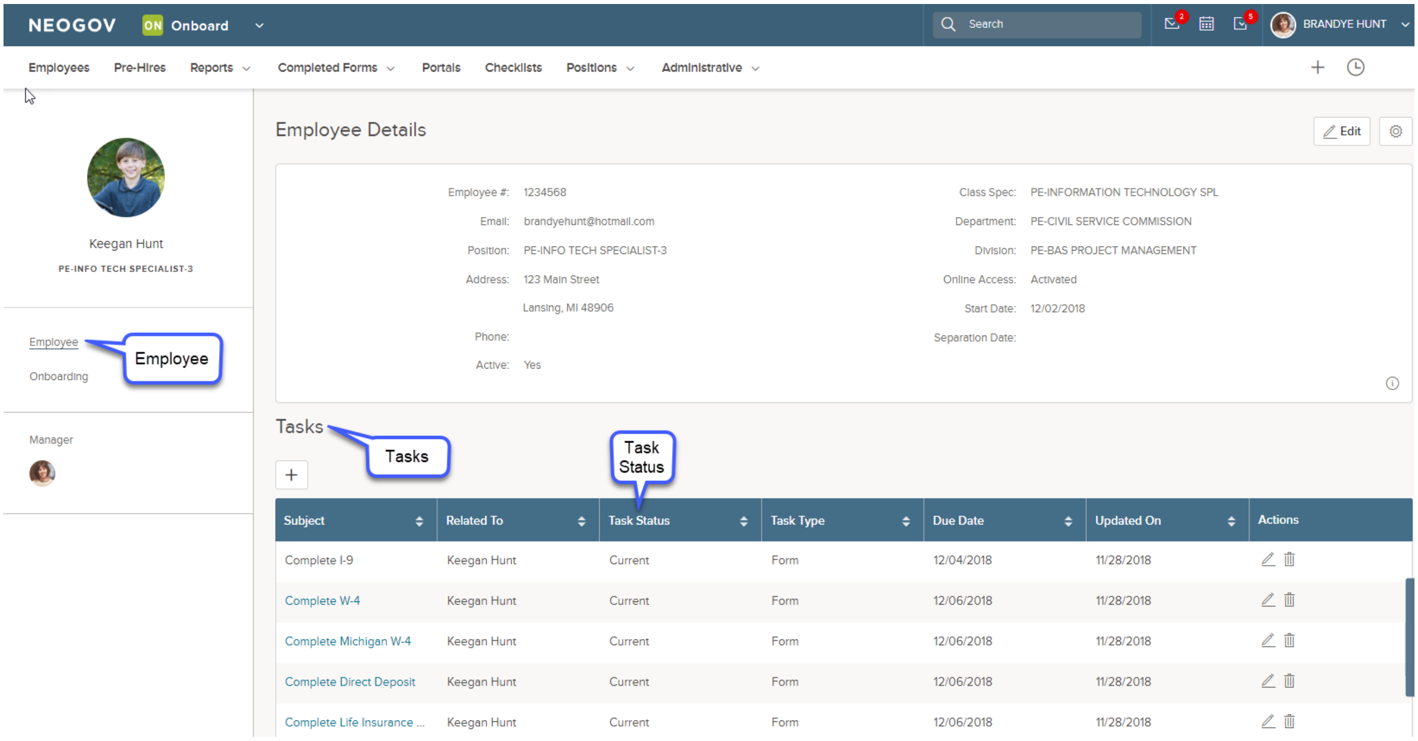
1. The Manager/Supervisor **Dashboard** will include your assigned direct report(s). Their icon(s) will appear beneath the **Direct Reports** header. You can either click on their individual icon or click on the Direct Reports link to display a listing of all.



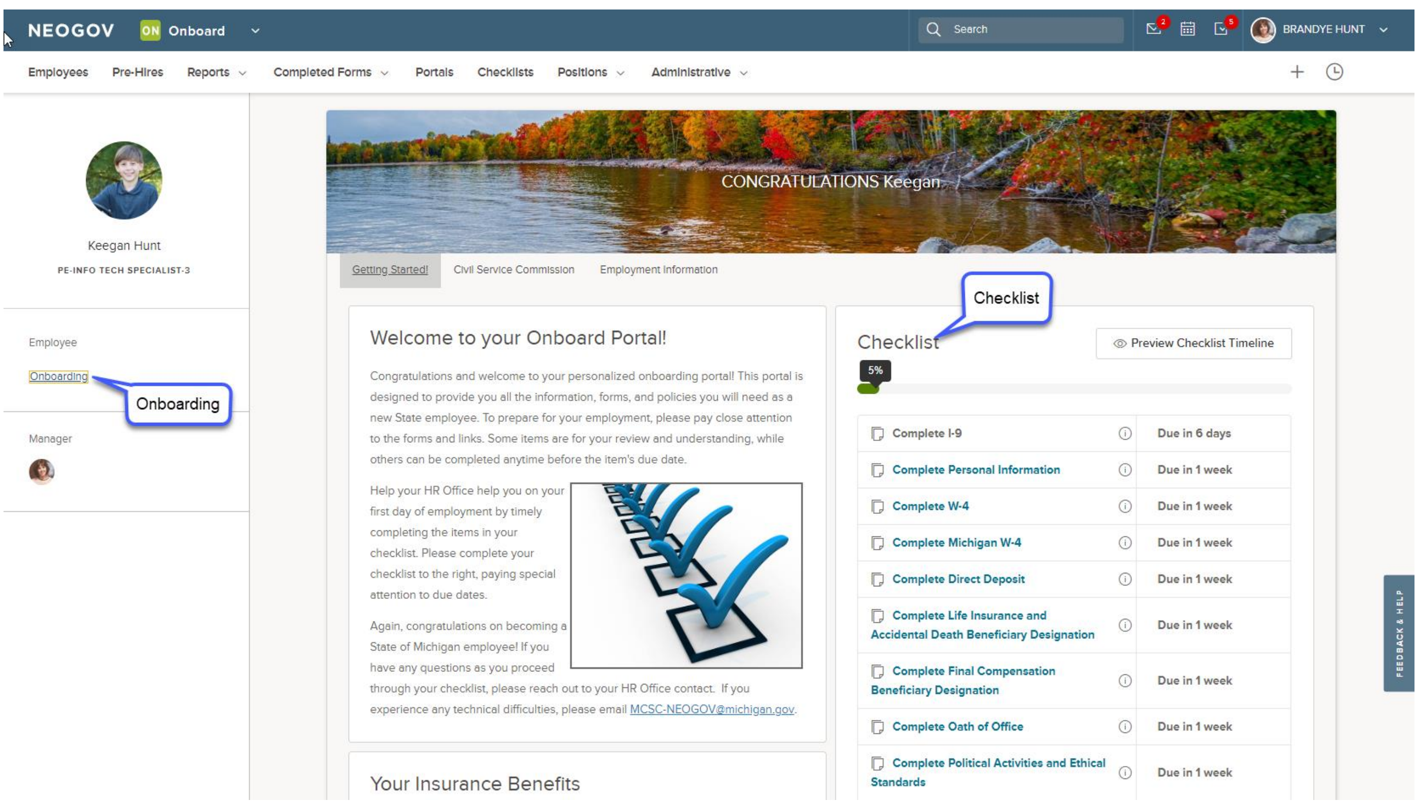
2. By clicking on the **Direct Reports** link, your **Employee List** will display. Click on the **Employee #** to review your new hire's Onboarding progress.



3. The **Employee** dashboard page displays. Within the **Tasks** section, assigned forms display with a **Status** of **Current** or **Complete**.



4. Click on the **Onboarding** link. The **Onboarding** dashboard displays. In the **Checklist** section, forms that still need to be completed will display. Further, a **Checklist** completed percentage will display.

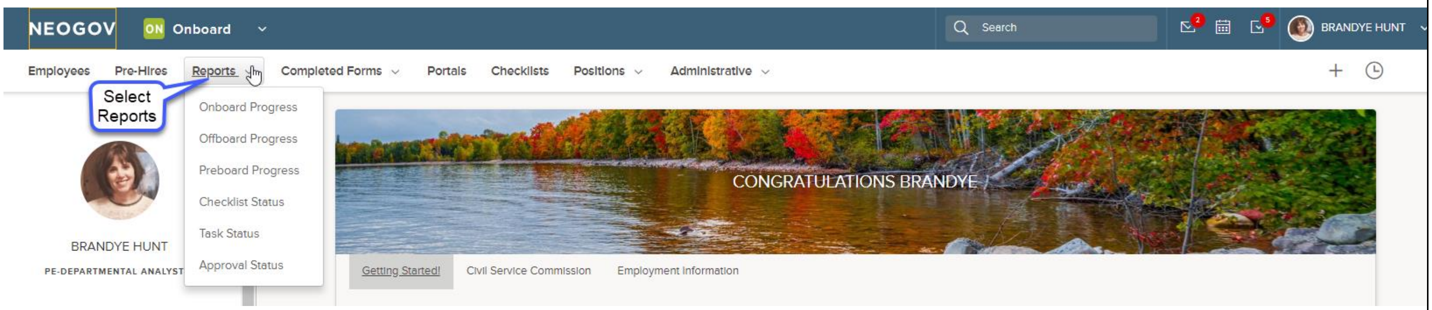


5. Clicking on the **NEOGOV** icon in the upper left hand corner always return you to your **Onboarding** screen.

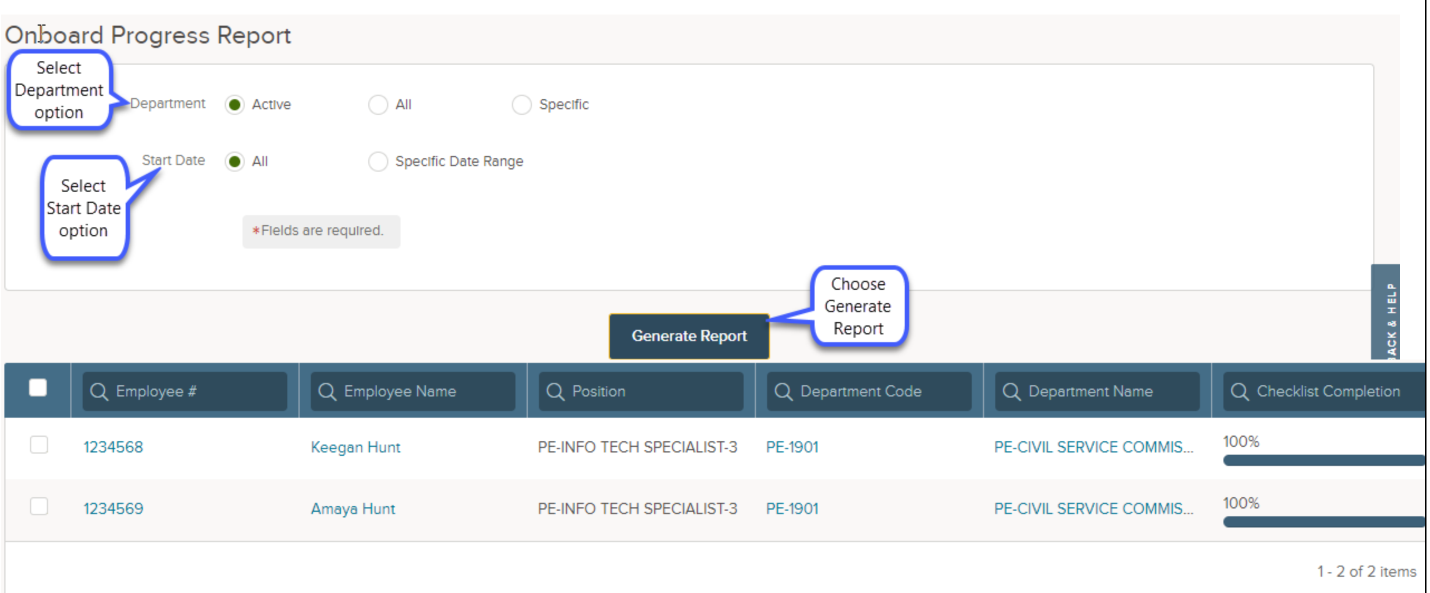
Reports - Managers

1. Managers have the ability to run reports on those employees who report directly to them.

2. Select the **Reports** menu option. Several report options are available.

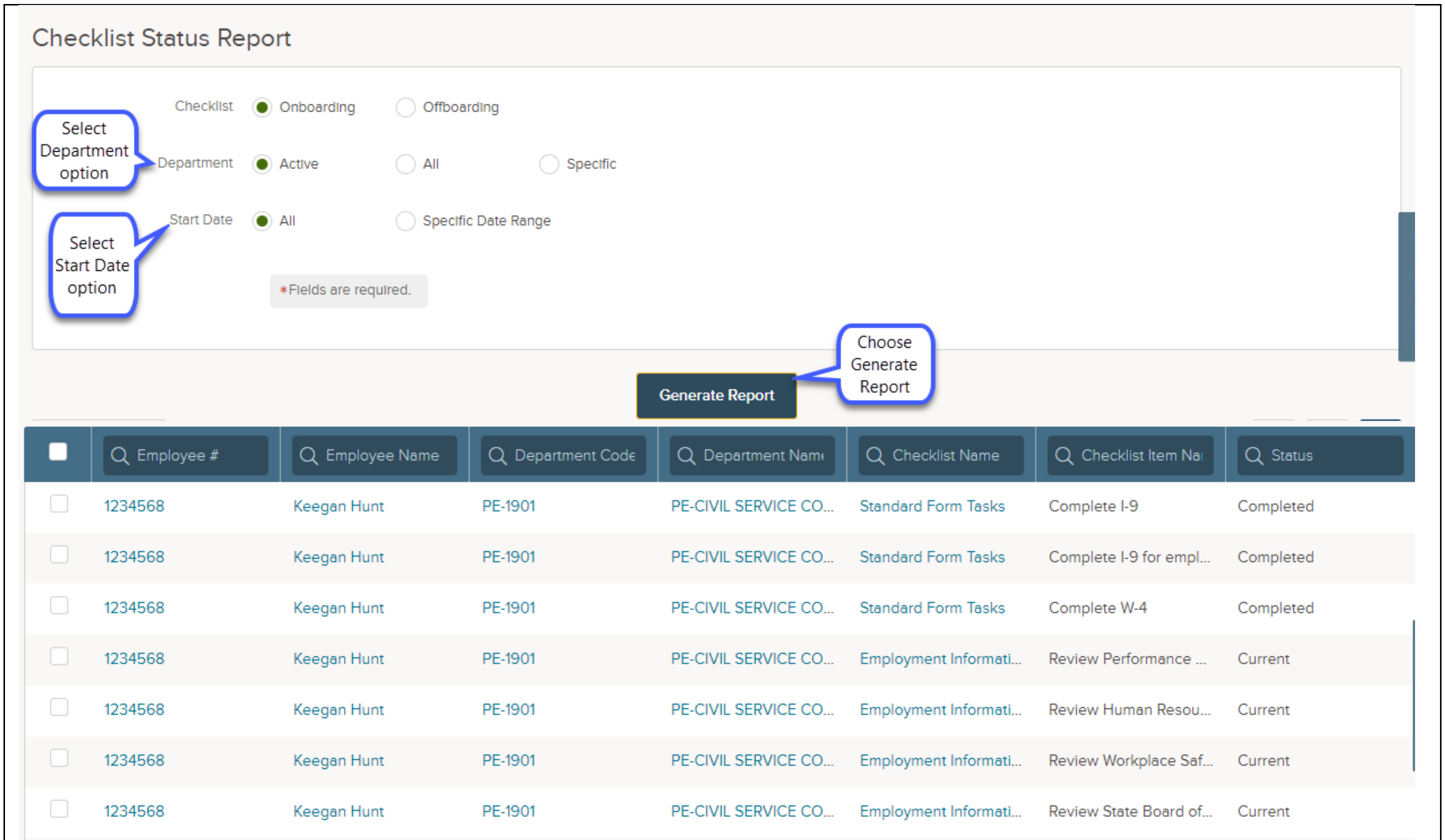


3. The **Onboard Progress** report displays the percentage status complete for each employee who has been assigned a checklist. Users can also filter on **Employee #**, **Employee Name**, **Position**, **Department Code**, **Department Name**, **Start Date** and **Checklist Completion %.** Simply choose whether to include only **Active**, **All** or **Specific** departments (based on user security) in the **Department** field and **All** start dates or a **Specific Date Range** in the **Start Date** field. Select **Generate Report.**



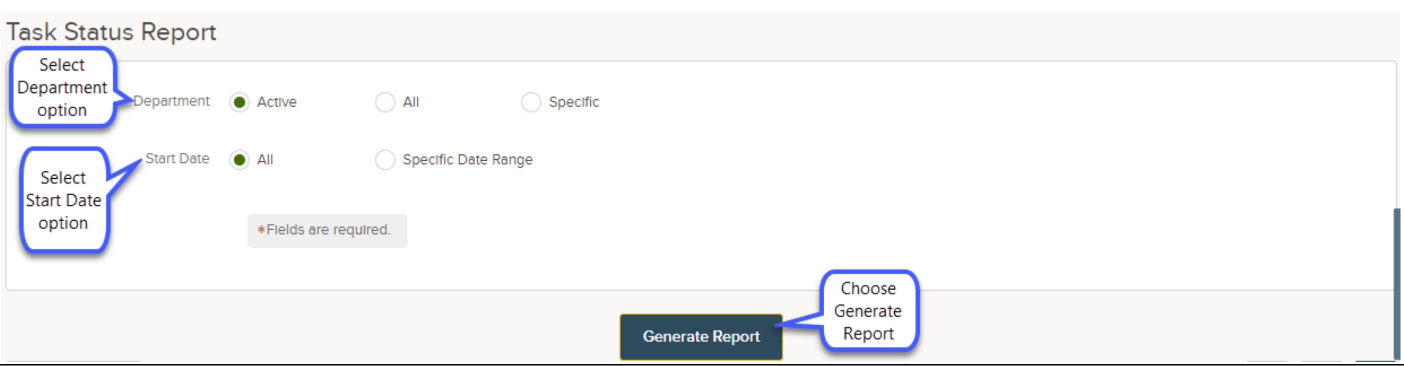
4. The **Offboard Progress** report is not being used at this time.

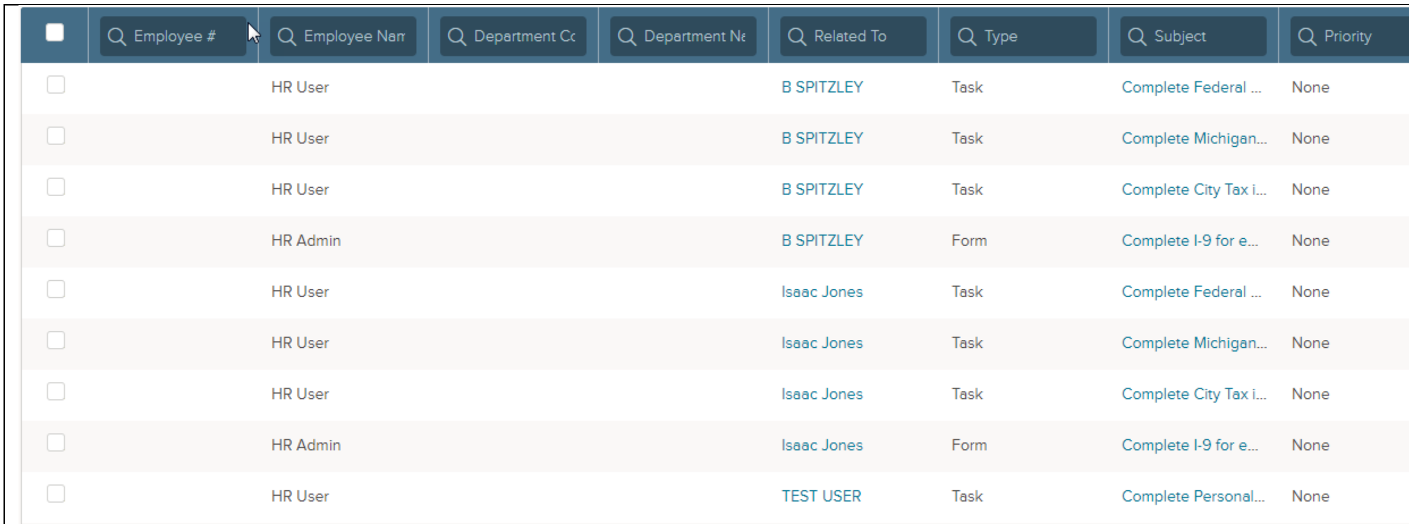
5. The **Checklist Status** report displays the status (current, completed, skipped, canceled, or overdue) of each checklist item for each employee. Users can also filter on **Employee #**, **Employee Name**, **Department Code**, **Department Name**, **Checklist Name**, **Checklist Item Name**, **Task Status**, **Start Date**, and **Separation Date**. Simply choose whether to include only **Active**, **All** or **Specific** departments (based on user security) in the **Department** field and **All** start dates or a **Specific Date Range** in the **Start Date** field. Select **Generate Report.**



	Employee #	Employee Name	Department Code	Department Name	Checklist Name	Checklist Item Na	Status
	1234568	Keegan Hunt	PE-1901	PE-CIVIL SERVICE CO...	Standard Form Tasks	Complete I-9	Completed
	1234568	Keegan Hunt	PE-1901	PE-CIVIL SERVICE CO...	Standard Form Tasks	Complete I-9 for empl...	Completed
	1234568	Keegan Hunt	PE-1901	PE-CIVIL SERVICE CO...	Standard Form Tasks	Complete W-4	Completed
	1234568	Keegan Hunt	PE-1901	PE-CIVIL SERVICE CO...	Employment Informati...	Review Performance ...	Current
	1234568	Keegan Hunt	PE-1901	PE-CIVIL SERVICE CO...	Employment Informati...	Review Human Resou...	Current
	1234568	Keegan Hunt	PE-1901	PE-CIVIL SERVICE CO...	Employment Informati...	Review Workplace Saf...	Current
	1234568	Keegan Hunt	PE-1901	PE-CIVIL SERVICE CO...	Employment Informati...	Review State Board of...	Current

6. The **Task Status** report displays the status of each task and the task assignee. Users can also filter on **Employee #**, **Employee Name**, **Department Code**, **Department Name**, who the task is **Related To**, **Task Type**, **Subject**, **Priority**, and **Status**. Simply choose whether to include only **Active**, **All** or **Specific** departments (based on user security) in the **Department** field and **All** start dates or a **Specific Date Range** in the **Start Date** field. Select **Generate Report.**



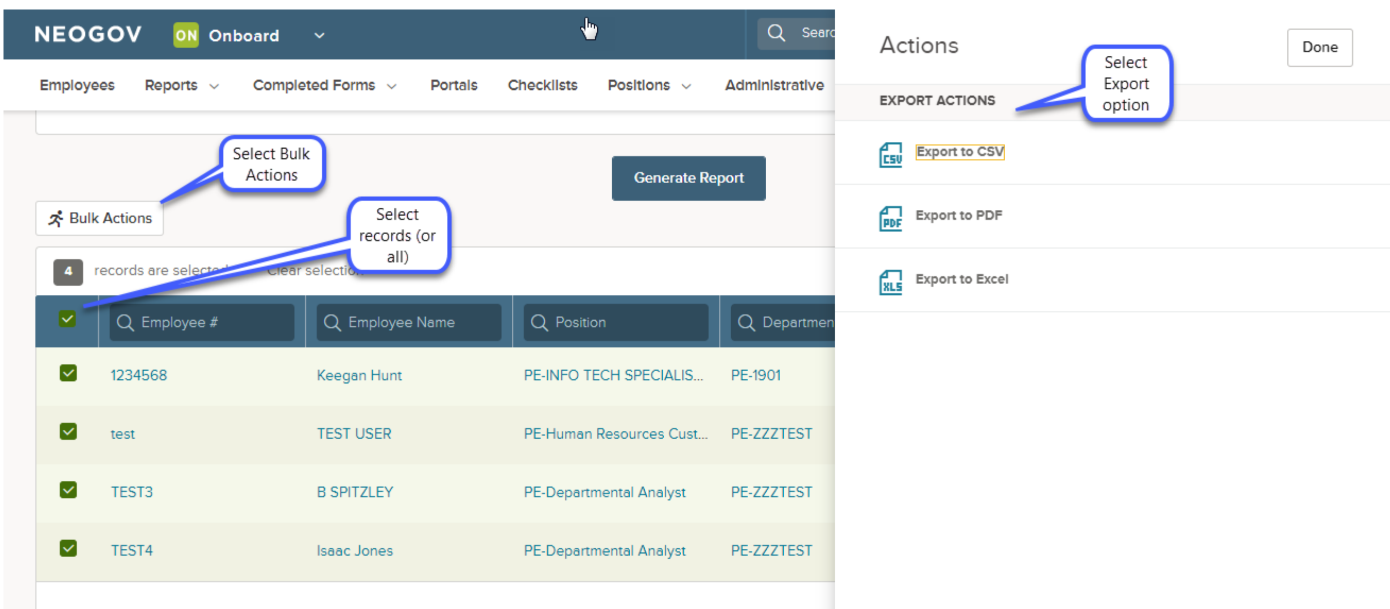


	Employee #	Employee Nam	Department Cc	Department Ne	Related To	Type	Subject	Priority
		HR User			B SPITZLEY	Task	Complete Federal ...	None
		HR User			B SPITZLEY	Task	Complete Michigan...	None
		HR User			B SPITZLEY	Task	Complete City Tax i...	None
		HR Admin			B SPITZLEY	Form	Complete I-9 for e...	None
		HR User			Isaac Jones	Task	Complete Federal ...	None
		HR User			Isaac Jones	Task	Complete Michigan...	None
		HR User			Isaac Jones	Task	Complete City Tax i...	None
		HR Admin			Isaac Jones	Form	Complete I-9 for e...	None
		HR User			TEST USER	Task	Complete Personal...	None

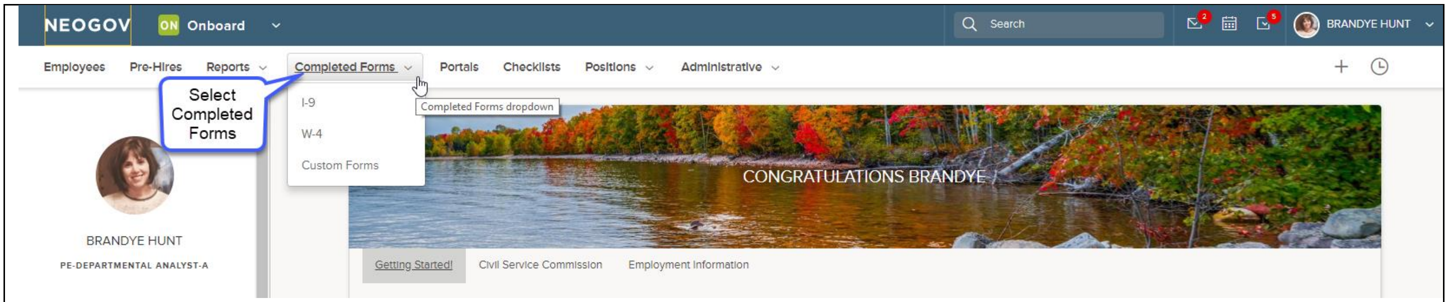
7. The **Approval Status** report is not being used at this time.

8. For any of the above reports, the report data can be exported if needed. Place a checkmark in front of each record to export (or all records), select **Bulk Actions** and then either **Export to CSV**, **Export to PDF** or **Export to Excel**.

9. Wait a moment for NEOGOV to build and provide the report.



10. Additional reports are available through the **Completed Forms** menu.



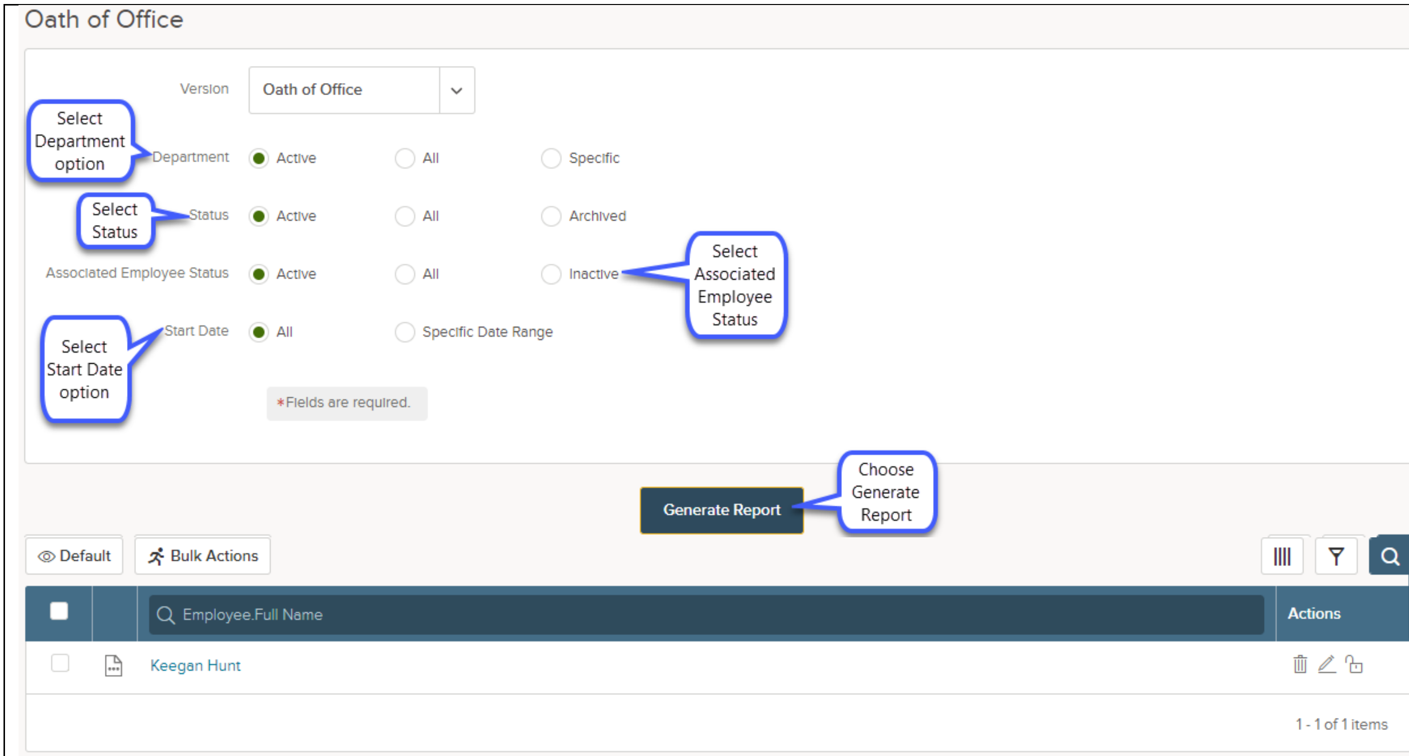
11. The **I-9** report only displays data for HR Office users.

12. The **W-4** report also displays data for HR Office users.

13. The **Custom Forms** report displays all State of Michigan specific custom forms, except the Federal I-9 and Federal W-4.

14. When **Custom Forms** is selected, all **Custom Forms** will display in the menu. Page through the forms (or begin to type the name in the **Name** field) and click on the form you wish to review.

15. Choose whether to include only **Active**, **All** or **Specific** departments (based on user security) in the **Department** field, **Active**, **All** or **Archived Status**es of the form (forms are archived when the employee separates), **Active**, **All** or **Inactive Associated Employee Status** (the status of the employee), and **All** start dates or a **Specific Date Range** in the **Start Date** field. Select **Generate Report.**

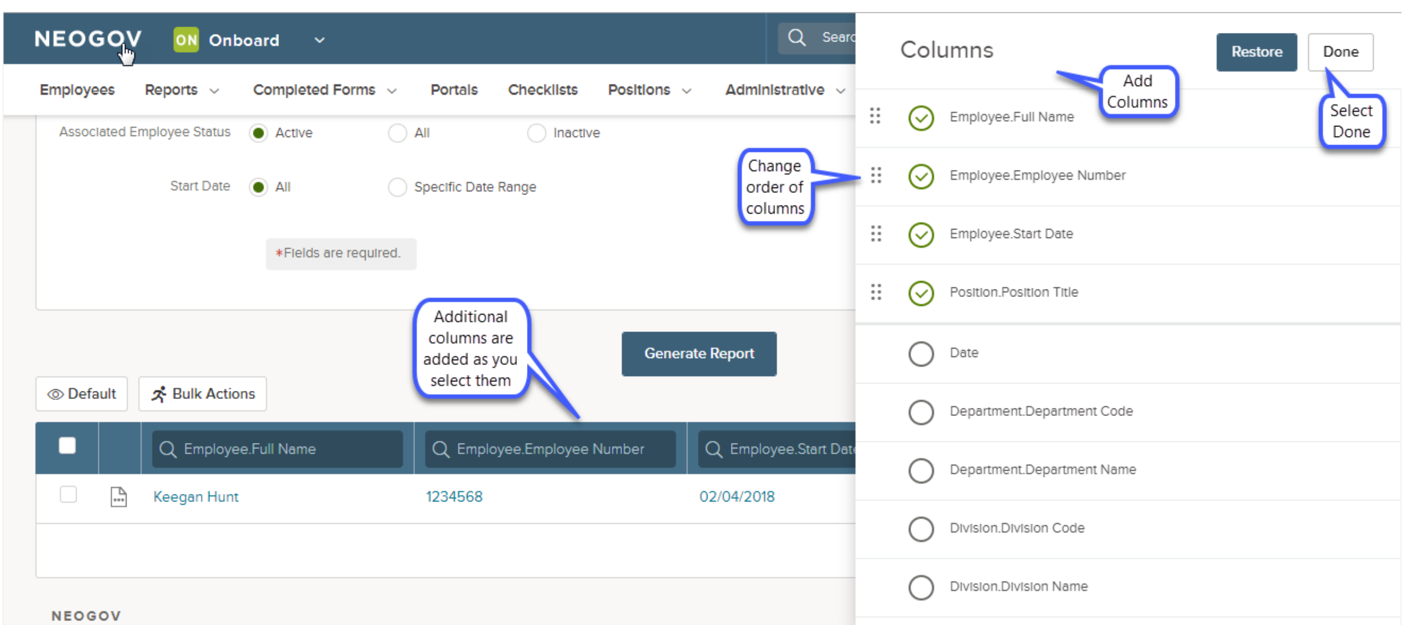


16. Each custom form has data specific to that form. Click on the icon to add additional columns.

17. A fly-out displays columns that are available for that specific custom form. Place a checkmark next to each **Column** you would like to add. **Columns** are added automatically to the report display as you select them.

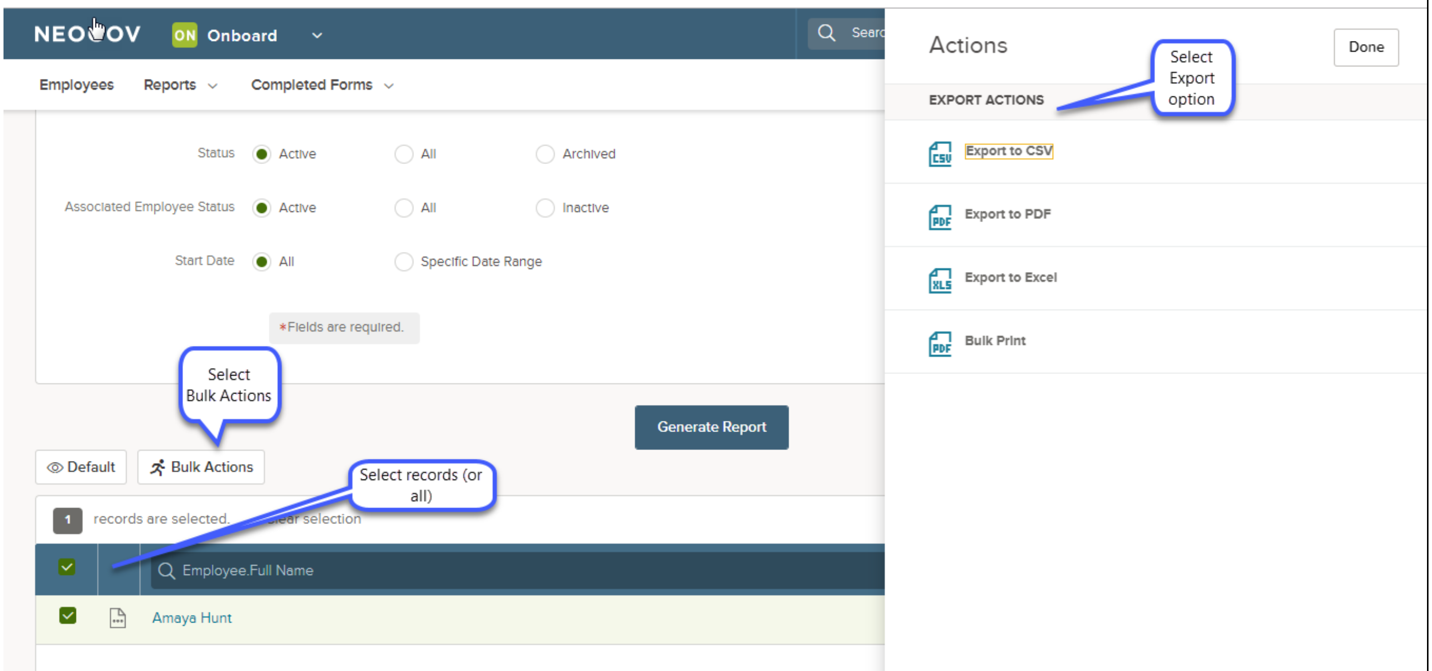
    You can also change the order in which the columns display by clicking on the icon and dragging it to your desired order.

18. Click **Done** when you have selected all of your needed columns.



19. For any of the above **Custom Forms** reports, the report data can be exported if needed. Place a checkmark in front of each record to export (or all records), select **Bulk Actions** and then either **Export to CSV**, **Export to PDF, Export to Excel** or **Bulk Print**.

20. Wait a moment for NEOGOV to build and provide the report.



21. To return to your dashboard click on **NEOGOV** in the upper-left corner.